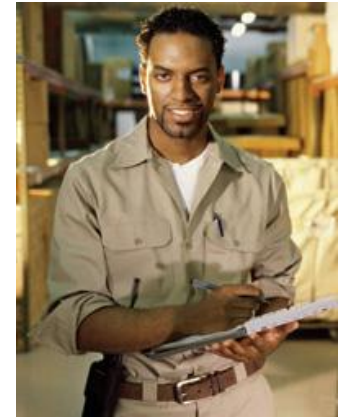


U.S. Small Business Administration



MENTOR/ PROTÉGÉ PROGRAM



Office of Government Contracting and Business
Development

TRAINING OVERVIEW

- PROGRAM HISTORY
- PROGRAM PURPOSE
- PROGRAM REQUIREMENTS
- EVALUATING THE AGREEMENT
- APPROVAL PROCESS
- ANNUAL REVIEW OF THE M/P-A RELATIONSHIP
- QUESTIONS AND ANSWERS

Office of Management & Technical Assistance

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MENTOR/PROTÉGÉ PROGRAM

HISTORY

and

INTENT

Program Purpose

- **To encourage**
- **To enhance and**
- **To improve**

Ref: 13 CFR 124.520(a)

Mentor Provided Assistance

- **Technical and Management**
- **Financial**
- **Sub-contractual Support and Joint Venture (JV) Arrangements**
- **General Business Development Assistance**

Ref: 13 CFR 124.520(a)

Mentor Requirements

- May be:
 - In the Transitional Stage,
 - An 8(a) graduate,
 - Another small business, or
 - A large business
- A Mentor must demonstrate:
 - Favorable financial health
 - Good character
 - Not on the Federal Debarred or Suspended List
 - Ability to provide valuable support

(Ref: 13 CFR 124.520(b))

Protégé Requirements

- In the Developmental Stage
or

- In the Transitional Stage,
but . . .

and

- In good standing

Agreement Requirements

- **Be in writing**
- **Include an assessment of the Protégé's needs**
- **Include a description of the Mentor's assistance**
- **Be in effect for at least one year**
- **Include a termination clause**

ADDITIONAL PROGRAM REQUIREMENTS

EVALUATING THE AGREEMENT

- Evaluate the **MENTOR**
- Evaluate the **PROTEGE**
- Evaluate the **AGREEMENT**

APPROVAL PROCESS

- Business Development Specialist**
- District Counsel**
- ADD/8(a)BD (or Lead Business Development Specialist)**
- District Director**
- Office of Management and Technical Assistance**
- Associate Administrator for Business Development**

Annual Review

- **The following must be submitted:**
 - **A request for extension**
 - **A modification certification**
 - **A narrative describing Mentor's success in assisting Protégé**
 - **The Mentor's certification of good character and favorable financial position**
 - **A report on the previous year**
 - **SBA Form 1450, Attachment B**

Annual Review

Attachment B, SBA Form 1450:

- **Technical and/or management assistance**
- **Loans or equity investments**
- **Subcontracts**
- **Federal contracts**

Annual Review

- BDS determines if goals were met**
- BDS evaluates the M/P–A relationship**
- ADD/8(a)BD makes final determination**
- District Office notifies OMTA of decision**

OMTA Contact Information

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